

Analysis of prices of fixed-line Internet access services in Poland

Warsaw, August 2019

Table of Contents

Analysis of prices of fixed-line Internet access services in Poland	0
1. Introduction	2
2. The purpose and scope of the analysis of prices of fixed-line Internet access.....	3
3. General information.....	3
3.1 Market of fixed-line Internet access services in Poland.....	6
4. Methodology.....	7
4.1 Method of cost calculation	8
5. Costs of using subscription offers for residential customers.....	10
5.1 Offers from 2 Mb/s to 10 Mb/s inclusive.....	11
5.2 Offers from 10 Mb/s to 30 Mb/s inclusive.....	12
5.3 Offers from 30 Mb/s to 100 Mb/s inclusive.....	13
5.4 Offers of above 100 Mb/s to 1 Gb/s	14
5.5 Offers of approx. 1 Gb/s or 1.2 Gb/s.....	16
5.6 Offers of above 1.2 Gb/s to approx. 10 Gb/s inclusive	16
6. Costs of using subscription offers for business customers.....	17
6.1 Offers from 2 Mb/s to 10 Mb/s inclusive.....	18
6.2 Offers from 10 Mb/s to 30 Mb/s inclusive.....	19
6.3 Offers from 30 Mb/s to 100 Mb/s inclusive.....	20
6.4 Offers of above 100 Mb/s to 1 Gb/s	21
6.5 Offers of approx. 1 Gb/s or 1.2 Gb/s.....	23
6.6 Offers of above 1.2 Gb/s to approx. 10 Gb/s inclusive	23
7. Price changes for fixed-line Internet access services	24
7.1 Offers for residential customers	24
7.2 Offers for business customers	25
8. Summary.....	26
9. Price lists (as at 10 May 2019)	27

1. Introduction

Internet access services are an increasing percentage of revenues within the telecommunications market enterprises. According to the Report on the state of the telecommunications market in Poland in 2018, the value of the Internet access services market amounted to EUR 1.26 billion¹, which is approximately 14% of the value of the telecommunications market in Poland. The number of subscribers to fixed-line Internet services is increasing year by year. In 2018, the number of fixed-line Internet access users amounted to 8.1 million users.

Access to broadband fixed-line Internet is increasingly important in the daily lives of Poles. *The role of the Internet in personal and professional life* consumer research shows that 66.7% of respondents had access to the fixed-line Internet. As many as 68% percent of respondents used the Internet at home for a minimum of 3 hours a day. But the Internet is not only used as a source of information and entertainment at home. More than 1/3 of respondents conduct business or commercial activities using this medium.

Internet users in Poland expect high quality services and a reasonable price. According to a study commissioned by UKE, the most frequent criteria for selecting a fixed-line Internet provider include the speed and price of services. A consumer survey published in December 2018 showed that the average monthly bill for fixed-line Internet was around € 12². The amount of bills for the network access service declared by the respondents ranged from 5.83 €³ to 46.67 €⁴ per month.

Taking into account the information collected about consumer preferences, UKE has prepared a document analysing the prices of fixed-line Internet access services in Poland in 2019. The status of the price lists of individual operators used in the analysis is as at 10 May 2019. The document also includes the results of previous analyses developed by UKE.

¹ PLN 5.4 billion - EUR rate - 4.3 (31.12.2018)

² PLN 51.5 - exchange rate € - 4.2853 (18.12.2018)

³ PLN 25 - exchange rate € - 4.2853 (18.12.2018)

⁴ PLN 200 - exchange rate € - 4.2853 (18.12.2018)

2. The purpose and scope of the analysis of prices of fixed-line Internet access

The purpose of this document is to present offers of access to fixed-line Internet in Poland in the first half of 2019. The scope of the analysis includes offers addressed to new users that are dedicated to both residential and business customers.

The average costs of use included subscription fees and one-off costs borne by users. According to the cost calculation method, promotional prices and discounts were included.

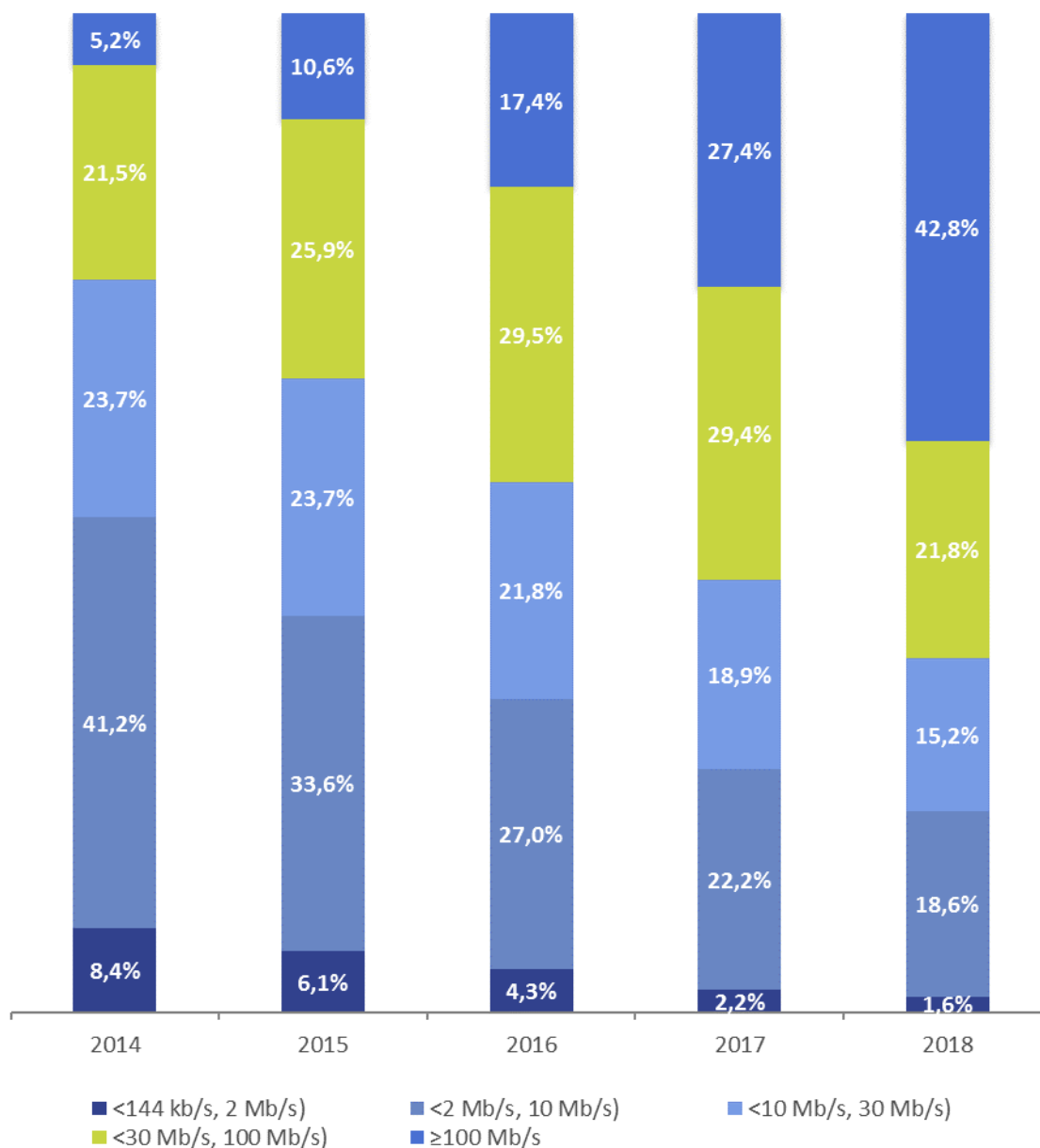
3. General information

Penetration of households with fixed-line Internet access services in Poland in 2018 amounted to approx. 57%. According to the Report on the state of the telecommunications market in Poland in 2018, 8.1 million users used fixed-line Internet.

Within five years, the number of fast (over 30 Mb/s to 100 Mb/s inclusive) and super-fast (over 100 Mb/s) fixed-line Internet lines grew dynamically. According to the Report on the state of the telecommunications market in Poland in 2018, approximately 43% of all fixed Internet access lines accounted for the capacity of over 100 Mb/s. This result was 16 percentage points better than in the previous year. Lines offering the capacity greater than 30 Mb/s in 2018 accounted for almost 2/3 of all used subscriber lines.

Chart 1

Share of fixed lines by capacity



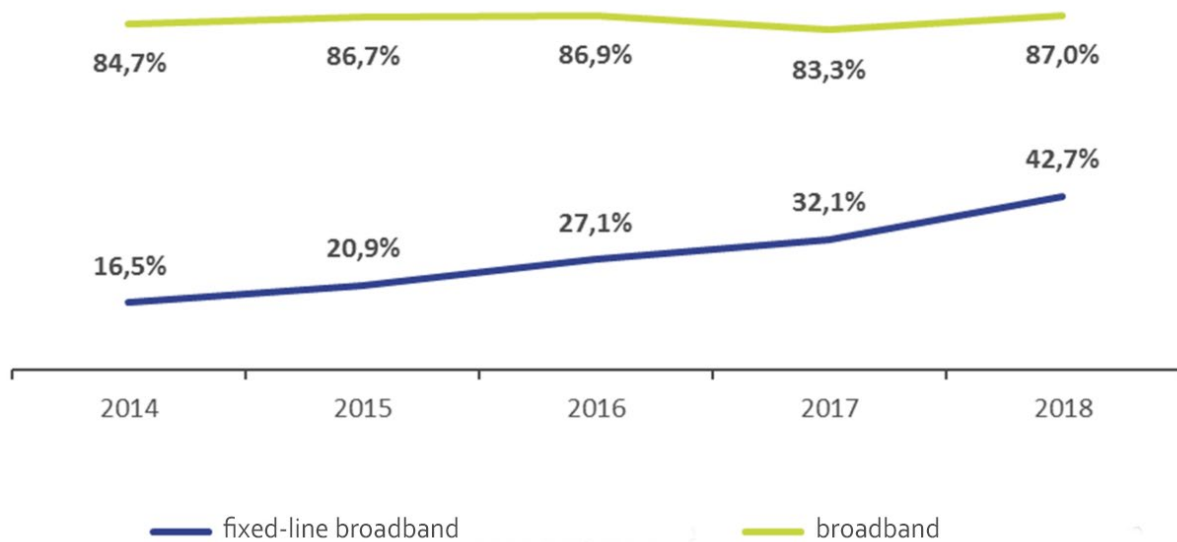
Source: UKE

The availability of fixed-line broadband Internet services in Poland has remained unchanged for several years. According to Eurostat, in 2018 almost 4/5 households in Poland had access to broadband Internet service (fixed and mobile lines).

Since 2014, the number of enterprises with access to fixed-line broadband Internet has grown dynamically. It is a standard in almost 43% of enterprises in Poland. Over 5 years, the indicator has increased by over 26 percentage points.

Chart 2

Percentage of enterprises with broadband Internet access, including fixed-line

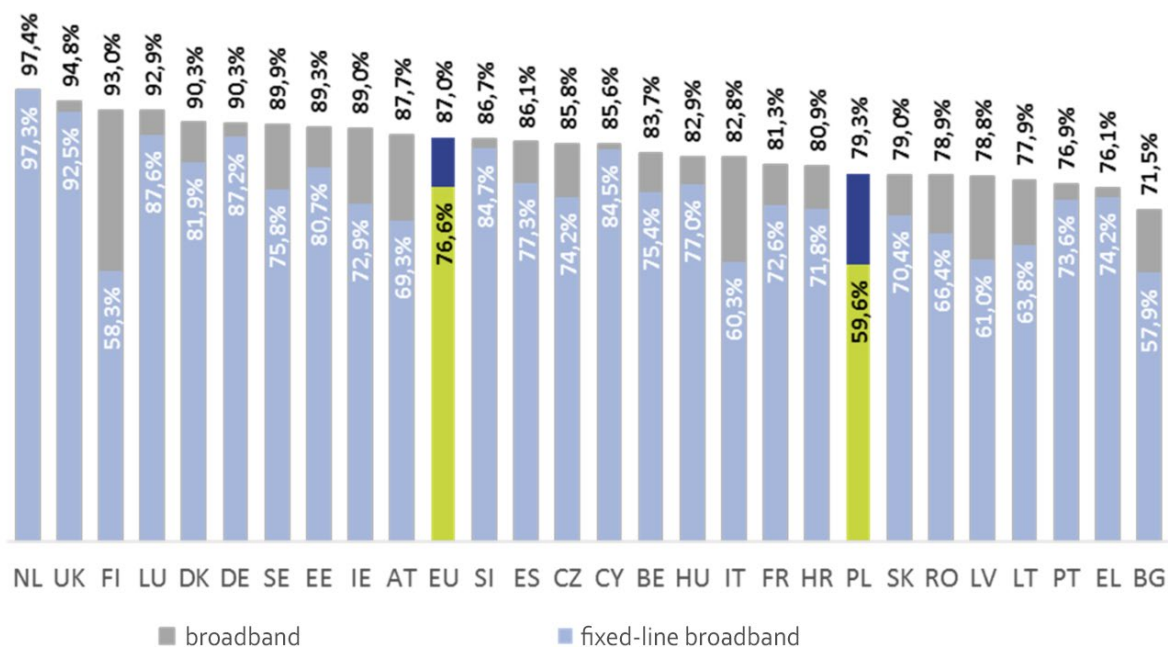


Source: Eurostat

Among households with broadband access, Poland ranked 21st among the 28 EU member states. As it was mentioned earlier, the percentage of households with access to broadband Internet in Poland amounted to approx. 51%. The average among EU countries, according to the Digital Agenda, in the same year amounted to 76.6%.

Chart 3

Percentage of households with broadband Internet access, including fixed-line broadband



Source: Eurostat

3.1 Market of fixed-line Internet access services in Poland

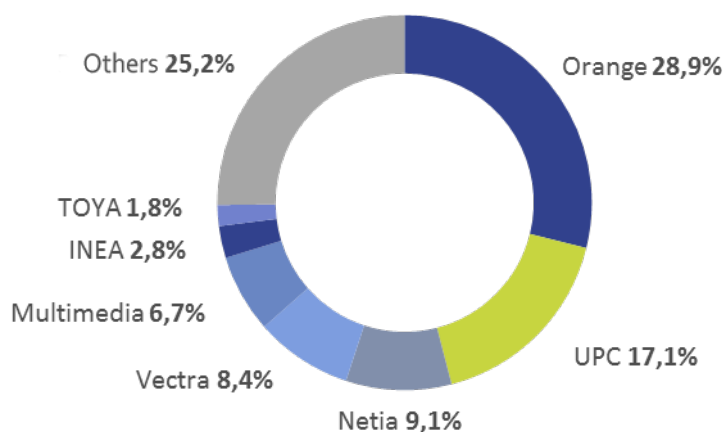
According to the data collected by UKE, in 2018 the majority of customers of operators offering fixed-line Internet access services in Poland were residential customers (88%). Only 12% of all fixed lines are used by business customers.

The structure in terms of entities present in the market of fixed-line Internet providers did not change significantly, compared to 2017. Orange still dominates among the operators offering fixed-line network access services, it held 28.9% of market shares. The next positions were respectively taken by UPC (17.1%), Netia (9.1%), Vectra (8.4%), Multimedia (6.7%), Inea (2.8%) and TOYA (1.8%). Other service providers constituted approximately one quarter of market shares.

The majority of service providers in Poland, both with significant market power as well as small and medium-sized ones, for the greatest part, base their offer on providing fixed-line network access along with the sale of additional services, such as pay TV, mobile Internet or fixed-line telephony or VoIP.

Chart 4

Structure of the fixed-line Internet access market in terms of providers in Poland



Source: UKE

4. Methodology

As part of the analysis, prices for services offered by the seven largest fixed-line Internet providers were compared; their shares in the market of fixed-line network access services in 2018 exceeded 1.5%. The benchmark included the offers of the following operators:

- Orange Polska S.A.
- UPC Polska Sp. z o.o.
- Netia S.A.
- Vectra S.A.
- Multimedia Polska S.A.
- INEA S.A.
- TOYA Sp. z o.o.

Due to the insignificant share of lines below 2 Mb/s in the total share of fixed lines and the lack of promotional offers for new customers with the mentioned capacity, the division in terms of Internet speeds used so far has been changed.

Offers were divided according to six types of capacity:

- from 2 Mb/s to 10 Mb/s inclusive,
- from 10 Mb/s to 30 Mb/s inclusive,
- from 30 Mb/s to 100 Mb/s inclusive,
- above 100 Mb/s to approx. 1 Gb/s,
- about 1 / 1.2 Gb/s
- up to approx. 10 Gb/s inclusive

Due to the particular popularity of super-fast fixed-line Internet services, an additional category up to 1 Gb/s / 1.2 Gb/s was formed. The largest Internet providers in Poland compete in offering consumers services provided by means of optical fibre (FTTx) or other technologies (HFC, etc.). The 1Gb/s speed is so strongly present in the media that it has even become the determinant of super-fast Internet in society. What is more, due to the available speed of the symmetric line up to about 10 Gb/s offered by one of the operators, an additional speed category above 1.2 Gb/s was created.

4.1 Method of cost calculation

During the process of collecting, processing data and analysing offers of fixed-line Internet access services, the following assumptions were made:

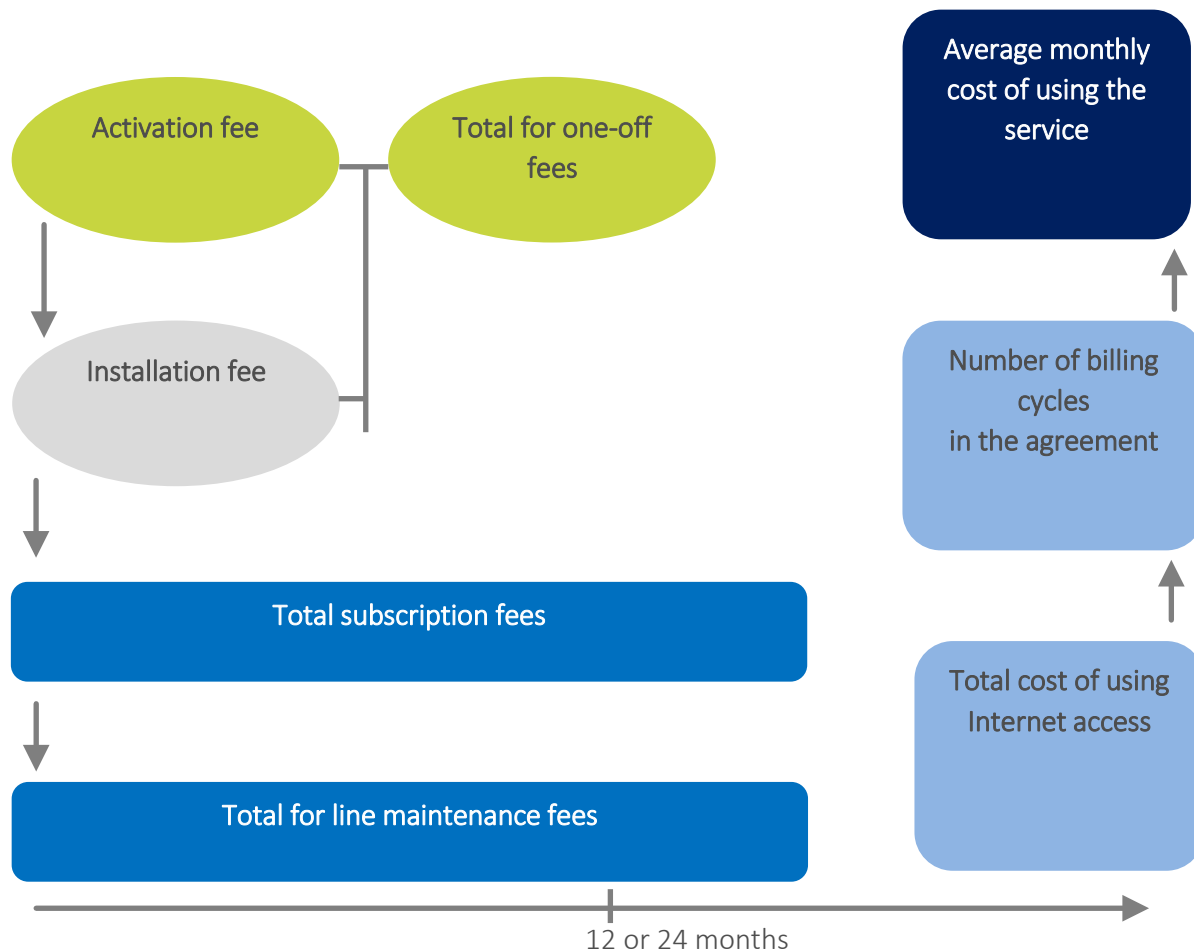
- only promotional offers addressed to new customers were taken into account,
- offers for both residential customers and business customers were analysed (sole proprietorships and small and medium-sized enterprises),
- service packages, i.e. bundled services, were not included,
- only temporary contracts (for 12 and 24 months) were taken into account,
- the analysis includes nationwide offers, regional offers of individual operators have not been taken into account,
- offers available in the regulated market have also been taken into account, i.e. those provided by the operator using the infrastructure built within the Operational Programme Digital Poland (POPC),
- the monthly rental fees included discounts granted by operators (e.g. discounts for e-invoices, lower prices for marketing consents),
- in the case of the Orange Polska S.A. offer the line maintenance fee was taken into account,
- no additional fees for business customers (symmetric line, one IP address for many devices, etc.) have been included,
- in contrast to last year's analyses, no fees for a cable modem or router were included,
- the prices given in the report are gross prices (they include a 23% VAT rate).

In the charts, all speeds are presented in Mb/s with the conversion factor 1Gb/s = 1000 Mb/s.

The benchmark uses the average euro exchange rate as at 10/05/2019 - the exchange rate of EUR - 4.2955, in other cases, unless the footnote says otherwise, the average exchange rate for the last day of the year was used.

Chart 5

Method of calculating the average monthly cost of using fixed-line Internet access



Source: UKE

Most fixed-line Internet access services offered in the portfolio of telecommunications operators are available to both residential and business users. However, some operators, e.g. INEA, prepare individual offers for entities conducting business activity based on the net present value (NPV). Therefore, when preparing analyses of offers for business clients, account was also taken of those offers for residential customers which were not specified as addressed solely to the latter.

5. Costs of using subscription offers for residential customers

In the analysis of subscription costs for residential customers, offers of the following operators were taken into account:

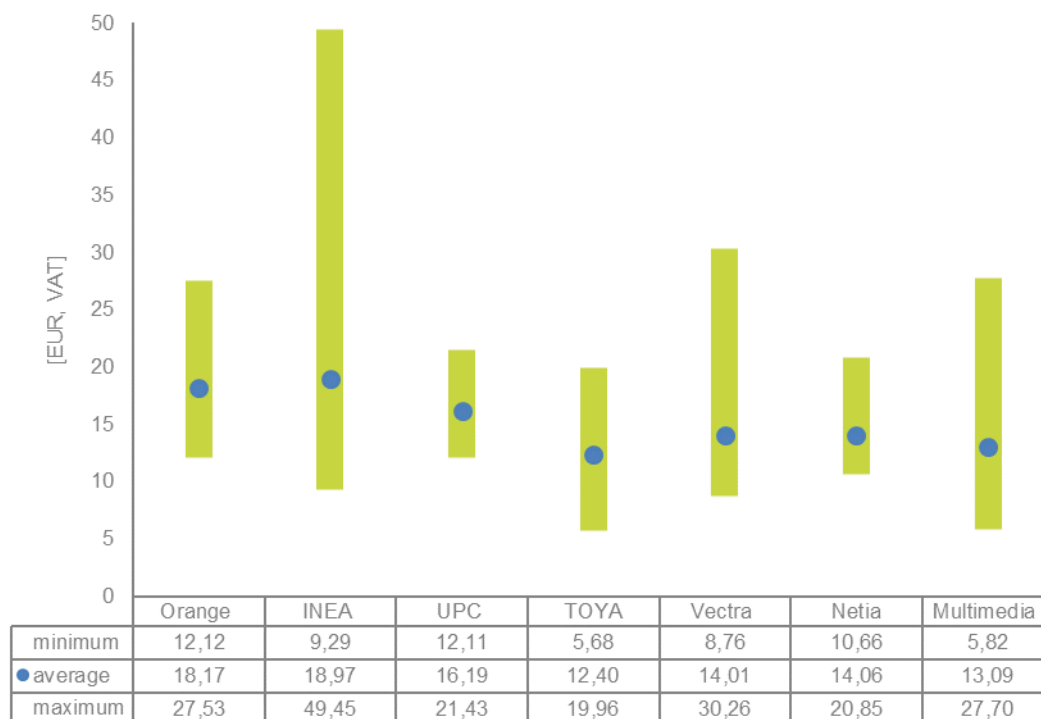
- Orange Polska S.A.
- UPC Polska Sp. z o.o.
- Netia S.A.
- Vectra S.A.
- Multimedia Polska S.A.
- INEA S.A.
- TOYA Sp. z o.o.

The study shows that the lowest costs were proposed by TOYA (5.68 €), and the highest - INEA (49.45 €). INEA has the most diverse offer in terms of prices. The difference between the cheapest (9.29 €) and the most expensive (49.45 €) offer of this company was 40.16 €. On average, the fixed-line Internet access service required the spending of the amount from € 12.40 (TOYA) to € 18.97 (INEA). The average usage costs, including all operators, amounted to € 15.13.

Chart 6

Minimum, medium and maximum values of average costs of using fixed-line Internet access services for residential

customers



Source: UKE

5.1 Offers from 2 Mb/s to 10 Mb/s inclusive

Only four operators offered fixed-line network access services of 2 Mb/s to 10 Mb/s inclusive. In the discussed range, the lowest maximum costs were offered by TOYA. The average Internet service costs for a maximum speed of up to 6 Mb/s with a two-year commitment amounted to 5.68 €, while the amount was 5.78 € in the agreement for 12 months. The greatest amount was to be paid for the Orange offer, respectively 12.80 € with a contract for 24 months and 20.54 € with a contract for 12 months.

Chart 7

Average monthly cost of using the Internet of above 2 Mb/s to 10 Mb/s inclusive for residential customers



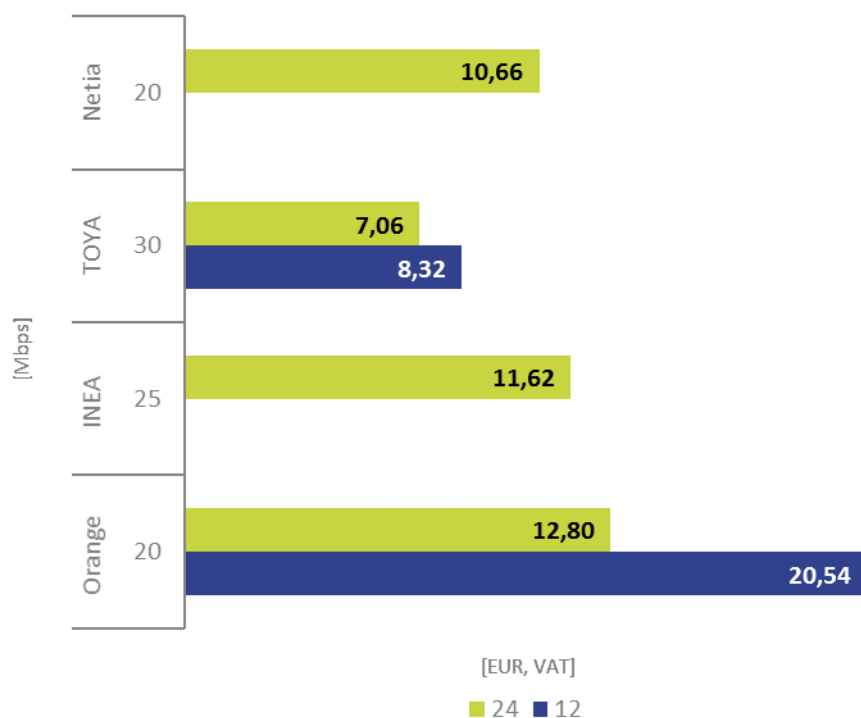
Source: UKE

5.2 Offers from 10 Mb/s to 30 Mb/s inclusive

Four of the seven largest operators offered a network access service of 10 Mb/s to 20 Mb/s, 25 Mb/s and 30 Mb/s. In the range of the download speeds discussed, the price difference between offers is slightly lower than for the speed range from 2 Mb/s to 10 Mb/s inclusive. The distance between the cheapest and the most expensive offer among offers with a two-year commitment ranged from € 7.06 to € 20.54. The lowest average usage costs were offered to residential customers by TOYA. The cost for an Internet access service of up to 30 Mb/s with a yearly commitment was € 8.32 and in the case of a contract for two years - € 7.06. The largest costs for fixed-line access to the network were to be borne if choosing the Orange offer in an agreement for 12 months (20.54 €) or 24 months (12.80 €).

Chart 8

Average monthly cost of using the Internet of above 10 Mb/s to 30 Mb/s inclusive for residential customers



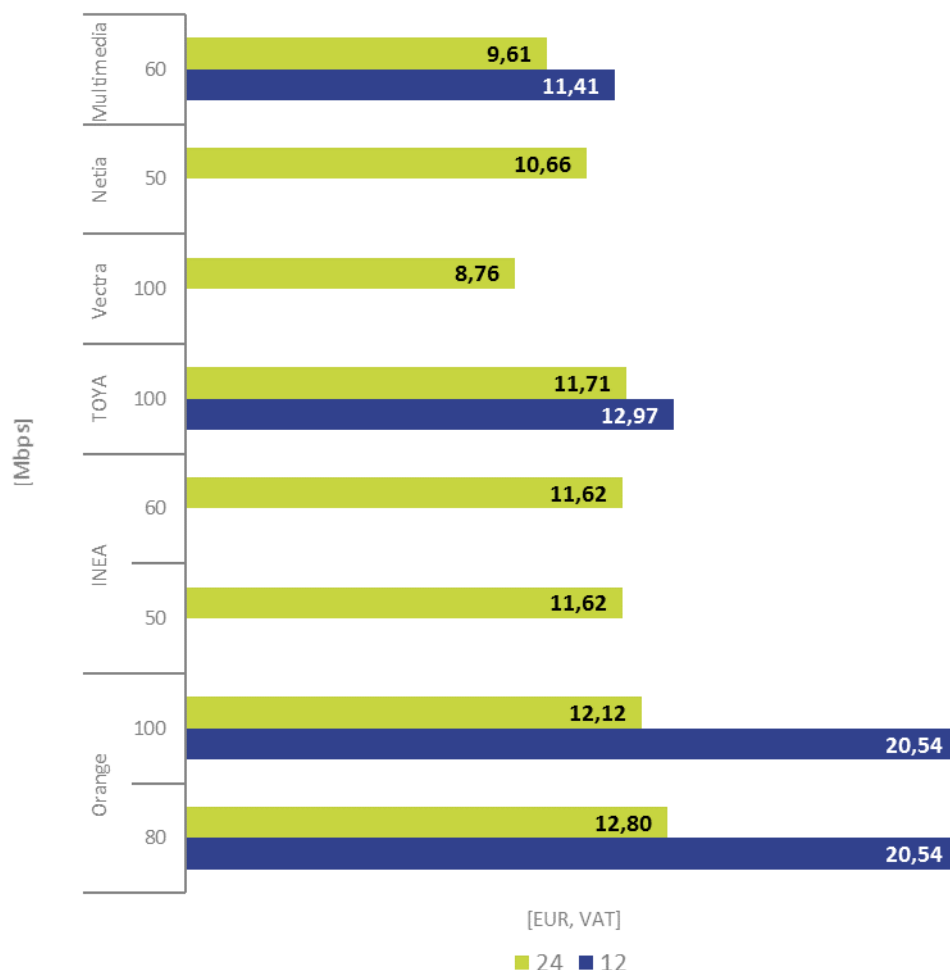
Source: UKE

5.3 Offers from 30 Mb/s to 100 Mb/s inclusive

All operators (7) offered residential customers fixed-line access to the network with a maximum speed of over 30 Mb/s to 100 Mb/s. The available speeds that you could use in the above range are: 50 Mb/s, 60 Mb/s, 80 Mb/s and 100 Mb/s. The average costs of using the fixed-line Internet access service in this range ranged from 8.76 € to 20.54 € a month. The lowest average usage costs were represented by Vectra (8.76 €), and the largest - Orange (20.54 €). Only three operators, Multimedia, TOYA and Orange, offered 12-month agreements. Most operators offered new users an agreement with a two-year commitment.

Chart 9

Average monthly cost of using the Internet of above 30 Mb/s to 100 Mb/s inclusive for residential customers



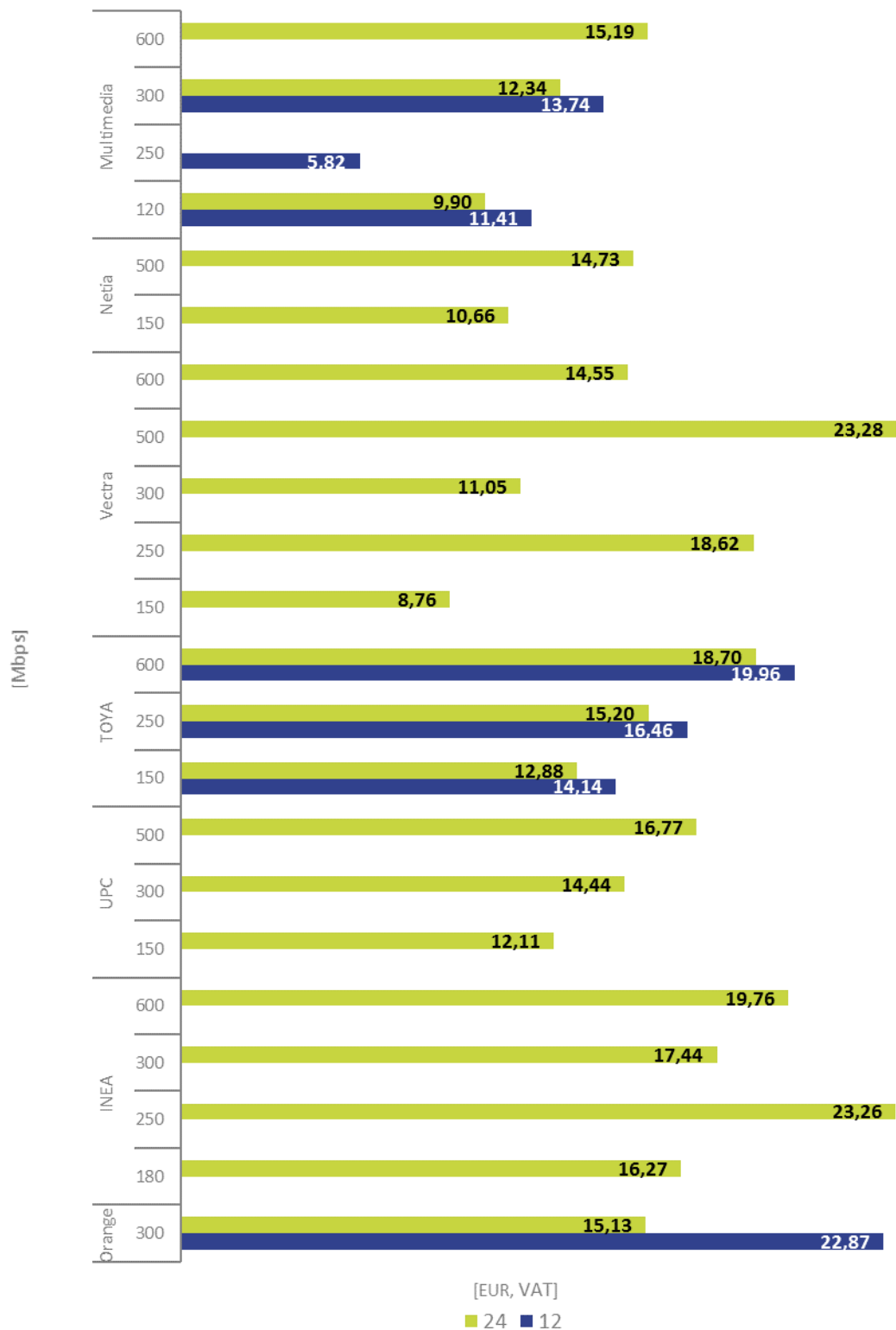
Source: UKE

5.4 Offers of above 100 Mb/s to 1 Gb/s

In this speed range, there are the greatest differences in prices and packages. In the discussed period, nine different speeds were available for residential customers: 120 Mb/s, 150 Mb/s, 180 Mb/s, 200 Mb/s, 250 Mb/s, 300 Mb/s, 400 Mb/s, 500 Mb/s, 600 Mb/s. The average usage cost ranged from 5.82 € to 23.28 €. Vectra, INEA and Multimedia presented the widest range of offers in terms of the maximum download speed and prices. The lowest rate was paid by Multimedia Polska users for the Internet of up to 250 Mb/s with a 12-month commitment (5.82 €), and the highest by Vectra customers for speeds at 500 Mb/s with an agreement signed for 2 years (23.28 €). Among the speed range discussed, the majority of offers are agreements with a commitment for 24 months. Only Orange, Multimedia Polska and TOYA offer their customers 12-month agreements.

Chart 10

Average monthly cost of using the Internet of above 100 Mb/s to 1 Gb/s inclusive for residential customers



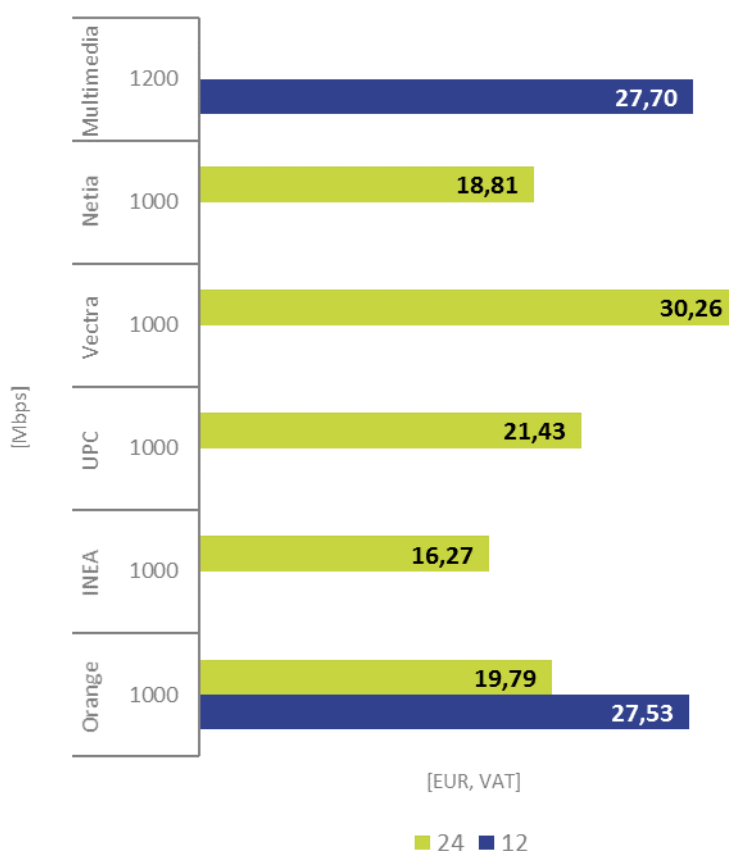
Source: UKE

5.5 Offers of approx. 1 Gb/s or 1.2 Gb/s

Among the offers with the highest speeds, special attention is paid to promotions for fixed-line Internet access services with a maximum speed of about 1 Gb/s (in the case of Multimedia Polska up to 1.2 Gb/s). Almost all operators, apart from TOYA, could offer residential customers the Internet of up to 1 / 1.2 Gb/s. The lowest usage cost was offered to INEA customers (€ 16.27), and the highest to Vectra users (€ 30.26). Most of them were associated with agreements with 24-month commitments. Annual commitments were offered to new customers of Orange and Multimedia Polska.

Chart 11

Average monthly cost of using the Internet of up to 1 Gb/s / 1.2 Gb/s inclusive for residential customers



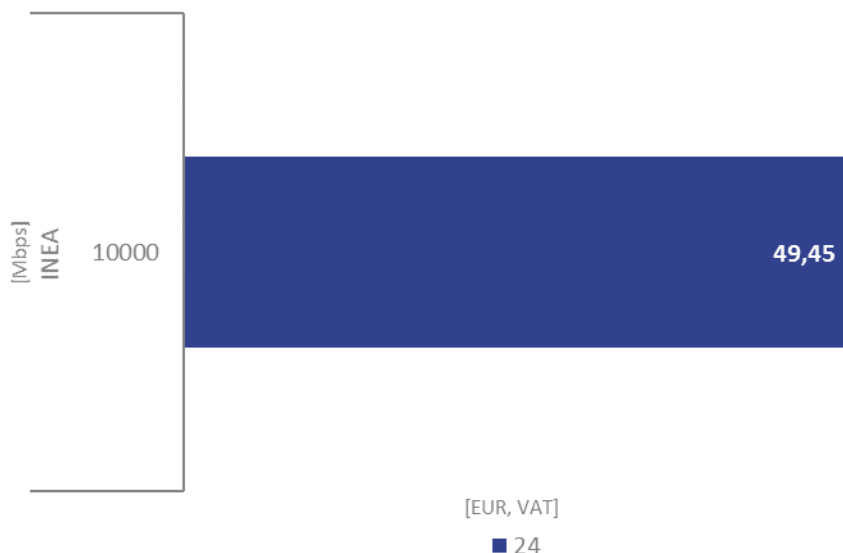
Source: UKE

5.6 Offers of above 1.2 Gb/s to approx. 10 Gb/s inclusive

Offers with speeds exceeding 1.2 Gb/s to approx. 10 Gb/s (10 Gb/s) were distinguished in the study. Out of the seven operators, only INEA offered to residential customers lines of this capacity in the mentioned period. It was the fastest and at the same time the most expensive offer in the market. Average usage costs amounted to 49.45 € monthly with an agreement for 24 months.

Chart 12

Average monthly cost of using the Internet of above 1.2 Gb/s to approx. 10 Gb/s inclusive for residential customers



Source: UKE

6. Costs of using subscription offers for business customers

As in the case of offers for residential customers, the following operators' offers were considered in the analysis of subscription costs for business customers:

- Orange Polska S.A.
- UPC Polska Sp. z o.o.
- Netia S.A.
- Vectra S.A.
- Multimedia Polska S.A.
- INEA S.A.
- TOYA Sp. z o.o.

INEA offered the most diverse offer in terms of the cost range, the least diversified was that of Vectra. The difference between the lowest and the highest price offer of the first operator was € 37.83 and of the second - € 12.89. The lowest average usage costs, as in the case of residential customers, were offered by Multimedia (5.82 €), and the highest by INEA (49.45 €). The difference between the cheapest and the most expensive offer among all operators was 43.63 €. On average, the fixed-line Internet access service required the spending of the amount from € 13.09 (Multimedia Polska) to € 26.83 (UPC). The average usage costs of selected offers included in the benchmark amounted to 18.62 €.

Chart 13

Minimum, medium and maximum values of average costs of using fixed-line Internet access services for business customers



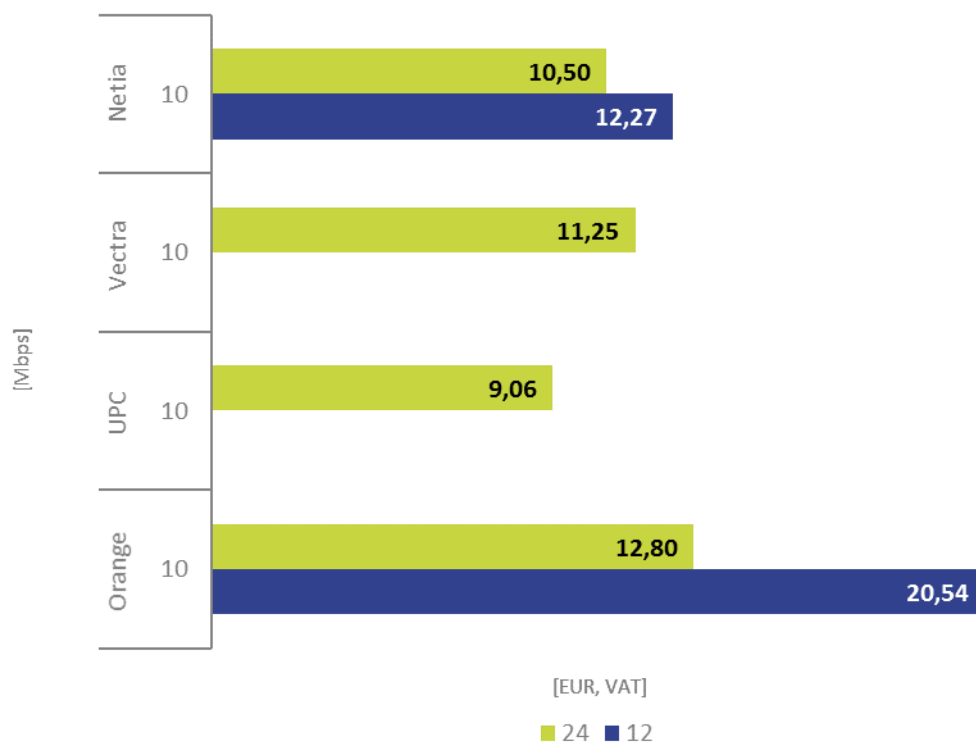
Source: UKE

6.1 Offers from 2 Mb/s to 10 Mb/s inclusive

In the discussed area, only business offers of up to 10 Mb/s were available to business customers. Of the four operators, only Netia and Orange offered services with a commitment for both one and two years. Among business offers with an agreement for 24 months, the cheapest offer was presented by UPC (9.06 €). The greatest amount, however, was to be paid for the service of up to 10 Mb/s from Orange, respectively 12.8 € with an agreement for 24 months and 20.54 € with a commitment for a year.

Chart 14

Average monthly cost of using the Internet from 2 Mb/s to 10 Mb/s inclusive for business customers



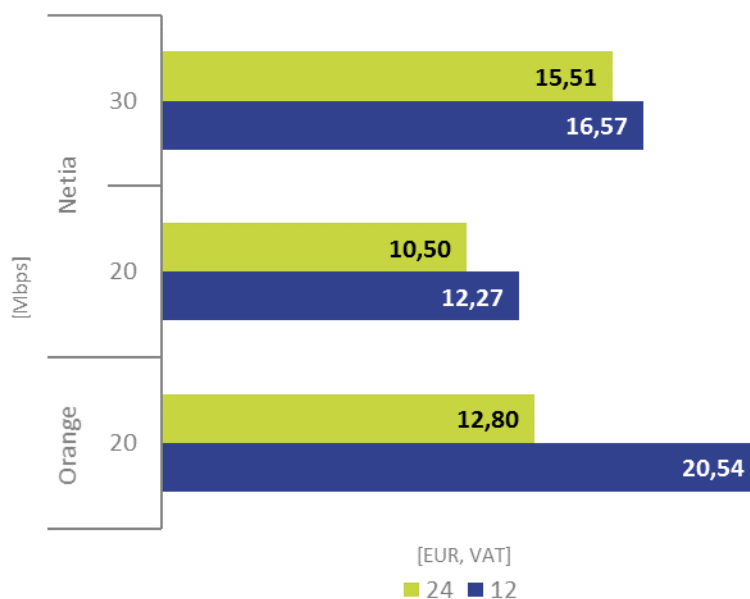
Source: UKE

6.2 Offers from 10 Mb/s to 30 Mb/s inclusive

Only two operators, Orange and Netia, had dedicated offers for business customers in this speed range. In the discussed area, average usage costs range from 10.50 € to 20.54 €. Lower costs are presented by Netia's offers, from 10.50 € for the max. download speed up to 20 Mb/s (24 months) to 16.57 € per the max. speed of up to 30 Mb/s (12 months). The price range of Orange offers ranges from € 12.80 (24 months) to € 20.54 (12 months). Interestingly, the average cost of using Orange offers did not differ from those with the maximum speed of up to 10 Mb/s.

Chart 15

Average monthly cost of using the Internet from 2 Mb/s to 10 Mb/s inclusive for business customers



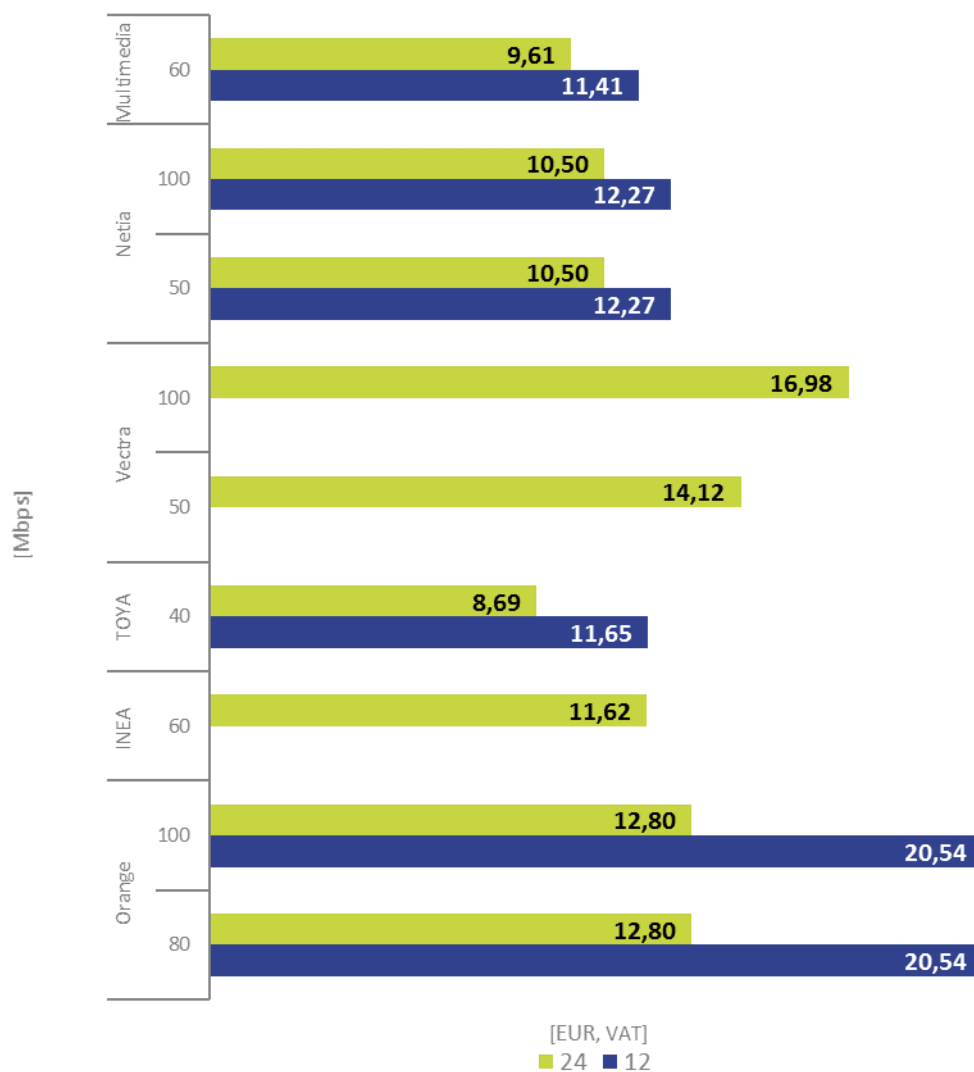
Source: UKE

6.3 Offers from 30 Mb/s to 100 Mb/s inclusive

The operators in the discussed speed range offer access services of 40 Mb/s, 50 Mb/s, 60 Mb/s, 80 Mb/s and 100 Mb/s. The difference between the lowest and the highest offer was 11.86 €. In terms of average usage costs, the most affordable offer was the one of TOYA (up to 40 Mb/s for 8.69 € with a two-year commitment), and the least that of Orange (up to 80 Mb/s and 100 Mb/s for 20.54 € in agreements for 12 months). All operators included in the benchmark offered fixed-line Internet access in the form of a 24-month commitment. Only Orange, Netia, Multimedia Polska and TOYA offered 12-month agreements for business customers.

Chart 16

Average monthly cost of using the Internet from 30 Mb/s to 100 Mb/s inclusive for business customers



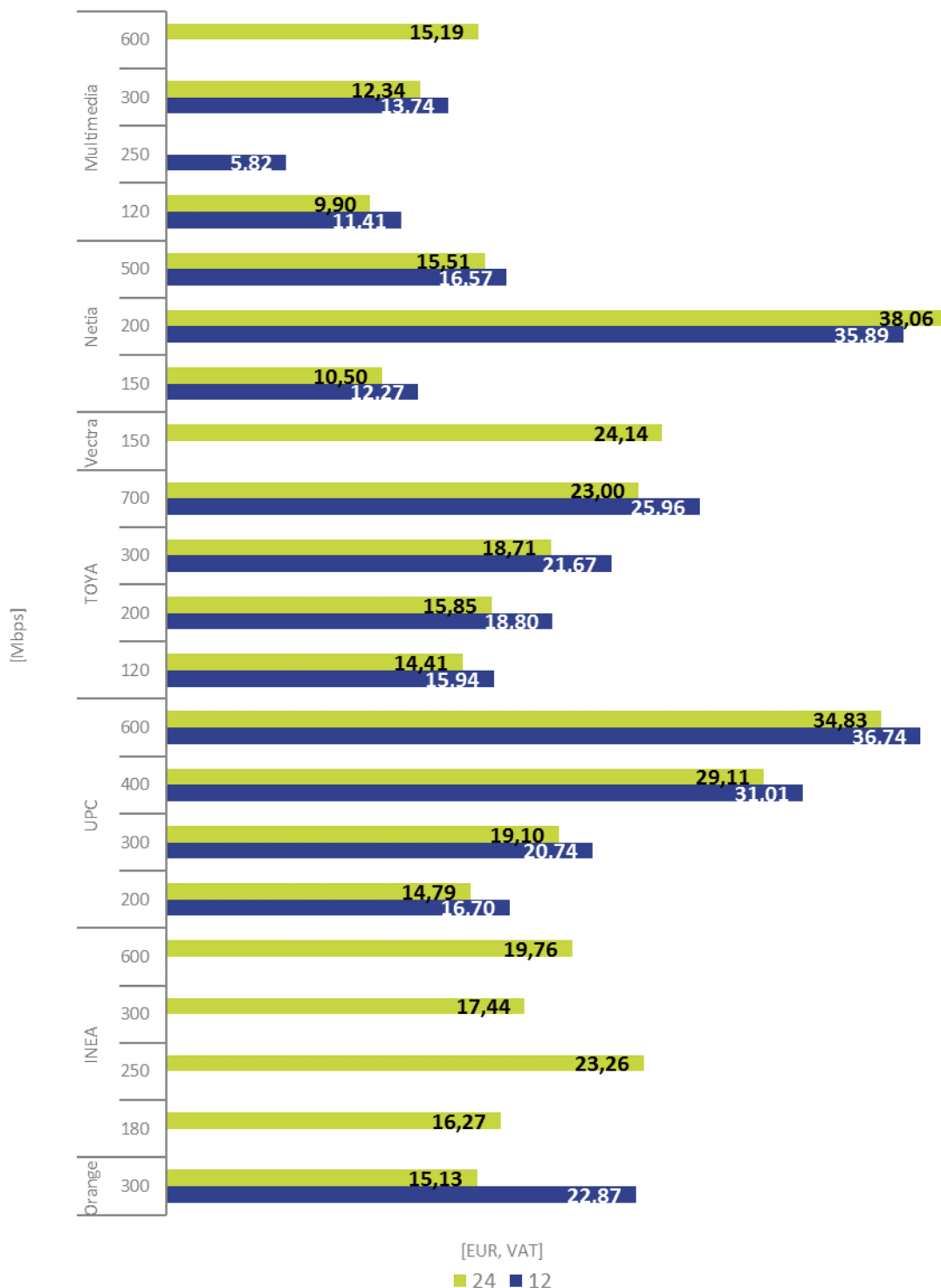
Source: UKE

6.4 Offers of above 100 Mb/s to 1 Gb/s

Offers of more than 100 Mb/s were most diverse in terms of prices and speeds. During the discussed period, ten different speeds were available for business customers: 120 Mb/s, 150 Mb/s, 180 Mb/s, 200 Mb/s, 250 Mb/s, 300 Mb/s, 400 Mb/s, 500 Mb/s, 600 Mb/s, 700 Mb/s. Prices of fixed-line Internet access services with download speeds exceeding 100 Mb/s ranged from 5.82 € to 38.06 €. The lowest rate (5.82 €) was paid by Multimedia Polska users for the 250 Mb/s service with a 24-month agreement. Customers wishing to use Netia's services had to pay the greatest amount. Customers had to pay € 38.06 for the Internet of 200 Mb/s with a commitment for two years. The most diverse offer in terms of speeds and duration of agreements was offered by TOYA and UPC.

Chart 17

Average monthly cost of using the Internet of above 100 Mb/s to 1 Gb/s for business customers



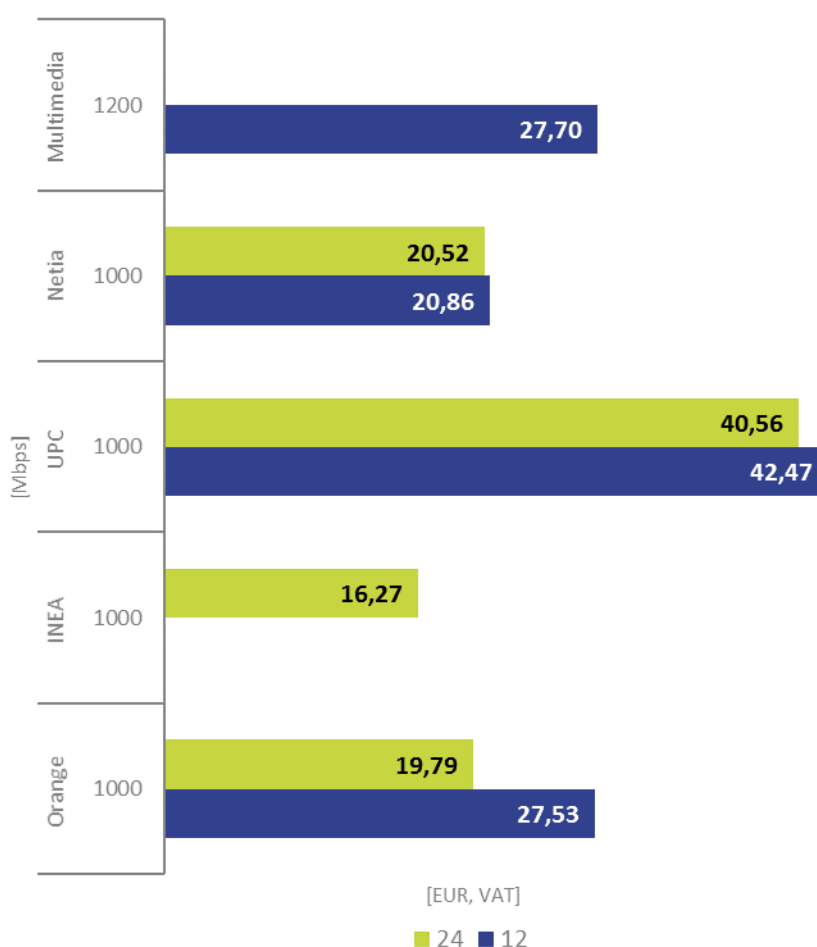
Source: UKE

6.5 Offers of approx. 1 Gb/s or 1.2 Gb/s

Six operators offered business customers the Internet of approx. 1 Gb/s (1.2 Gb/s for Multimedia). The cheapest offer for business entities in terms of average usage costs was offered by INEA, with an agreement for 24 months (€ 16.27). The greatest amount was to be paid if choosing the UPC offer with an annual commitment (42.27 €). The fixed-line Internet access services with the maximum speed of 1 Gb/s with a commitment for both 12 and 24 months were offered by UPC, Orange and Netia.

Chart 18

Average monthly cost of using the Internet of up to 1 Gb/s inclusive and up to 1.2 Gb/s inclusive for business customers



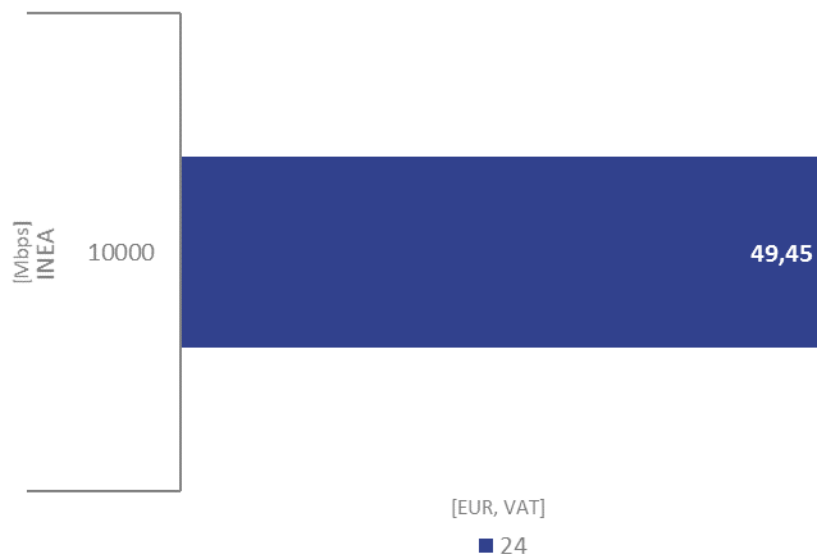
Source: UKE

6.6 Offers of above 1.2 Gb/s to approx. 10 Gb/s inclusive

As for residential offers, offers with speeds above 1.2 Gb/s to approx. 10 Gb/s were distinguished for business customers (sole proprietorship). The fastest and at the same time the most expensive offer in the market among offers for business customers was that from INEA. The average usage costs amounted to 49.45 € monthly with an agreement for 24 months.

Chart 19

Average monthly cost of using the Internet of above 1.2 Gb/s to approx. 10 Gb/s inclusive for business customers



Source: UKE

7. Price changes for fixed-line Internet access services

The changes in the prices of Internet access services over the period of 2014-2019 are presented below. For this benchmark, data was used based on the Analysis of prices of fixed-line Internet access services in Poland published in March 2014, May 2015 and October 2016 and Analysis of the prices of fixed-line Internet access services in Poland of April 2018. The following analysis includes the arithmetic mean value of service usage costs for the four speed ranges corresponding to the data collected for the needs of the European Commission: from 2 Mb/s to 10 Mb/s, from 10 Mb/s to 30 Mb/s, from 30 Mb/s to 100 Mb/s and above 100 Mb/s (including offers of above 1 Gb/s)

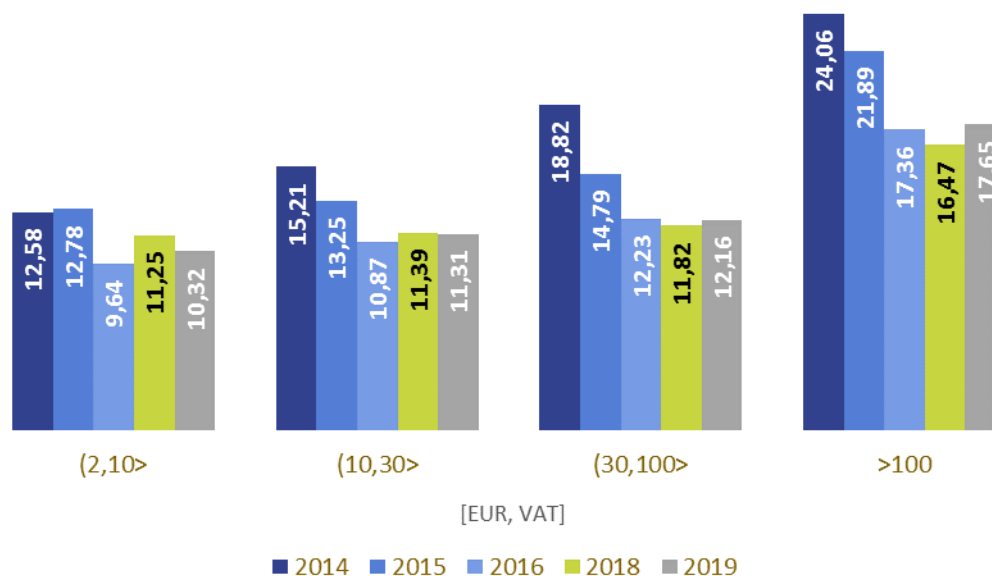
7.1 Offers for residential customers

Compared to 2018, prices of fixed-line Internet access in 2019 decreased in the two lowest speed ranges: between 2 Mb/s and 10 Mb/s and between 10 Mb/s and 30 Mb/s. The percentage difference was 8% and less than 1%, respectively. Interestingly, the average usage cost increased in the two largest speed ranges: from 30 Mb/s to 100 Mb/s (about 3%) and above 100 Mb/s (about 7%).

Within 5 years, prices decreased in all of the speed ranges discussed. The greatest decreases are visible in the range of super-fast lines: respectively 35% (from 30 Mb/s to 100 Mb/s) and 26% (above 100 Mb/s). Compared to 2016, there are also slight decreases in the highest speed ranges, respectively exceeding 3% and over 1%.

Chart 20

Arithmetic mean value of the costs of using fixed-line Internet access services for residential customers



Source: UKE

7.2 Offers for business customers

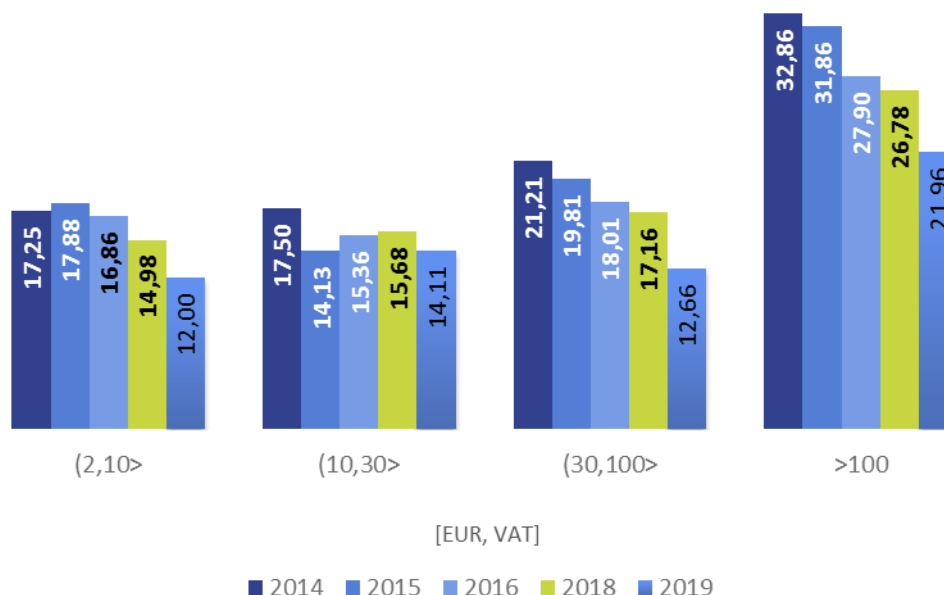
The decrease in average usage costs for business customers is observed in all speeds.

The largest price differences in relation to 2016 were visible in the range from 30 Mb/s to 100 Mb/s inclusive. Average costs decreased by 26%, compared to the past year. The smallest (approx. 10%) was the decrease in the prices of services from 10 Mb/s to 30 Mb/s.

Over 5 years, there are big differences in the prices for fixed-line access services. Since 2014, there has been a general trend, apart from individual exceptions, for the prices to drop in all speed ranges. This is the most evident in the case of fast (from 30 Mb/s to 100 Mb/s) (40%) and super-fast (over 100 Mb/s) lines (33%). Costs of using low speed lines (below 10 Mb/s and from 10 Mb/s to 30 Mb/s) have also decreased considerably. The changes amounted to approx. 30% and approx. 20% respectively, compared to the previous year.

Chart 21

Arithmetic mean value of the costs of using fixed-line Internet access services for business customers



Source: UKE

8. Summary

Over the past 5 years, the market of fixed-line Internet access services has changed dynamically. The number of users of fixed-line Internet access is increasing year by year. The share of fast (over 30 Mb/s) and super-fast (over 100 Mb/s) fixed lines is also growing systematically. In 2018, it totalled 65%. With technological progress, the share of lines below 30 Mb/s is decreasing. In total, they constitute approx. 35% of all fixed -lines. Currently, most of the largest operators have in their portfolio offers for fixed-line Internet access of up to 1 Gb/s, and sometimes even significantly above this value.

According to the conclusions from the last year's market analysis, prices of Internet access services should continue to systematically decrease. Meanwhile, this trend is only observed for business offers. In comparison to 2018, the average usage costs for services provided to residential customers with the use of fast and super-fast lines increased by 3% and 7%, respectively. Compared to 2016, the costs of using the lowest speed lines of up to 10 Mb/s and 30 Mb/s increased slightly, by 4% and 1% respectively. The observations are also confirmed by the *Report on the state of the telecommunications market in Poland in 2018* results; they indicate an increase in the average revenue per subscriber to Internet access services over the past year by PLN 0.30⁵.

⁵ PLN 1.3 - exchange rate € - 4.3 (31.12.2018)

Among all operators whose offers have been analysed in this document, there is an increase in the available speeds in offers dedicated to both residential and business customers. In order to increase their competitiveness, the largest operators offer higher speeds, which is also associated with increased usage costs. The greatest changes in costs are observed for fast and super-fast lines. This can be explained by the fact that with technological progress, the previously used lines are replaced with newer ones. According to the latest Report on the state of the telecommunications market in Poland in 2018, 8% of all users of fixed-line Internet used FTTH, and the percentage of fibre optic lines will be growing even more dynamically in the coming years.

As the bills increase, Internet providers offer their customers a wider choice of available packages and speeds. Bundles are becoming increasingly popular among subscription offers. They are systematically gaining popularity in the telecommunications services market in Poland. According to the Report on the state of the telecommunications market in Poland in 2018, compared to 2017, the value of the bundled services market was EUR 1.72 billion⁶. Therefore, Internet offers without additional services lose their current attractiveness and are more and more often bundled with other services.

9. Price lists (as at 10 May 2019)

Orange Polska S.A.

- Orange Internet 3/18 promotion rules and regulations
- Orange Światłowód 2/1 promotion rules and regulations

INEA S.A.

- Internet xDSL v. 1.0 24 promotion rules and regulations
- INEA v 1.0 24 promotion rules and regulations
- Inwestycje Światłowód v 1.0 24 promotion rules and regulations
- Światłowód v 1.0 24 promotion rules and regulations

TOYA Sp. z o.o.

- "Warto na dłużej" ("Worth for a longer time") promotion rules and regulations
- Price list for TOYA services

Multimedia Polska S.A.

- Internet 60Mb + Mega BSM 12 E2F/N 24 E2F/N promotion rules and regulations
- Internet 120Mb + Mega BSM 12 E2F/N 24 E2F/N promotion rules and regulations
- Internet 300Mb + LAN 250 Mega BSM 12 E2F/N 24 E2F/N promotion rules and regulations
- Internet 600Mb + Mega BSM 12 E2F/N promotion rules and regulations
- Internet 1.2 Gb + Mega BSM 12 E2F/N promotion rules and regulations

UPC Polska Sp. z o.o.

⁶ PLN 7.38 billion - EUR rate - 4.3 (December 31, 2018)

- Price list of UPC B2C and B2B services

Vectra S.A.

- POPC promotion rules and regulations: New Subscriber
- New Subscriber SOLO3MC1 promotion rules and regulations
- New Subscriber SOLO1MC1 promotion rules and regulations
- LOK_FSWL19 offer promotion rules and regulations
- WL 19 New Subscriber promotion rules and regulations

Netia S.A.

- Price list for Netia services (8 May 2019)
- Gigapromocja promotion rules and regulations
- Elastyczna Oferta dla Firm (Flexible Offer for Companies) promotion rules and regulations

Office of Electronic Communications

Strategy and Analysis Department
Telephone number +48 22 534 9335
Fax number +48 22 534 9322
sekretariat.dsa@uke.gov.pl

uke.gov.pl